

# DIGITAL LANDSCAPE & VIDEO VIEWING REPORT

October 2018

# OVERVIEW

20,657,000

People 2+ who were actively surfing online

	Among Adult Australians...	Ages 18+	Ages 18-24	Ages 25-34	Ages 35 - 44	Ages 45 - 54	Ages 55 - 64	Ages 65+
<b>Total</b> 	Online Australians (000s)	17,571	2,315	3,676	3,202	3,082	2,578	2,717
	Profile %	85%	11%	18%	16%	15%	12%	13%
	Time per online Australian (hh:mm)	95:27	98:48	112:37	103:24	95:55	83:50	70:31
	Population Reach %	83%	91%	94%	88%	90%	84%	59%
<b>Desktop</b> 	Online Australians (000s)	15,211	1,857	2,754	2,830	2,905	2,479	2,387
	Time per online Australian (hh:mm)	26:06	24:10	26:21	23:36	30:24	26:28	24:40
<b>Smartphone</b> 	Online Australians (000s)	15,349	2,066	3,864	2,954	2,522	2,695	1,249
	Time per online Australian (hh:mm)	64:53	82:12	73:45	67:43	63:23	48:04	41:24
<b>Tablet</b> 	Online Australians (000s)	*NA	*NA	*NA	*NA	*NA	*NA	*NA
	Time per online Australian (hh:mm)	*NA	*NA	*NA	*NA	*NA	*NA	*NA

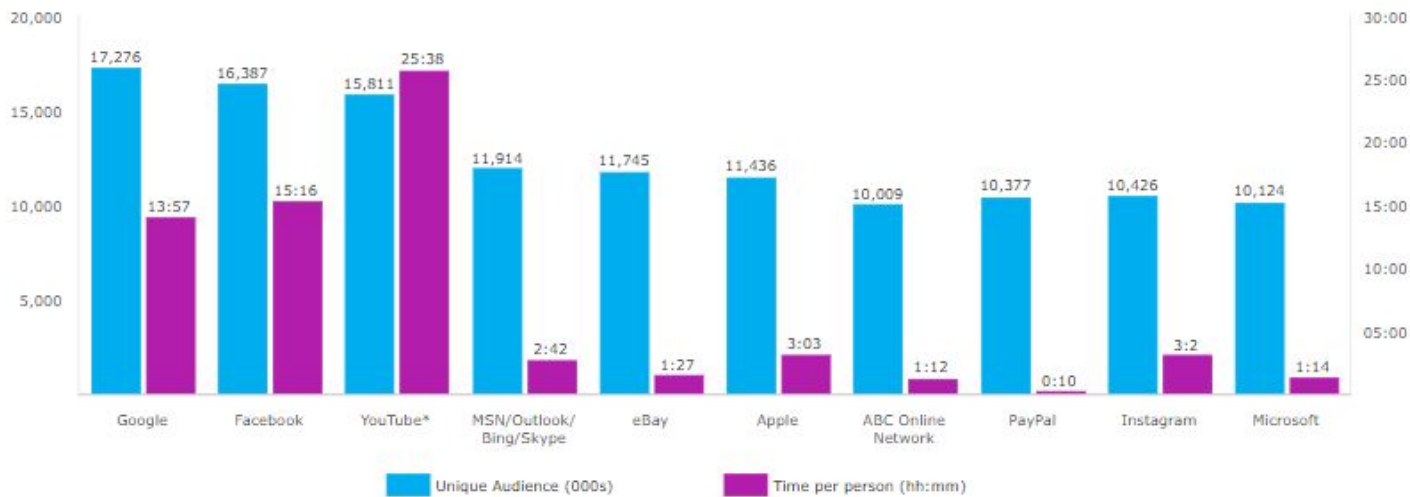
\*NOTE: Due to sample size limitations, demographic profiling of the tablet is Not Available  
 Source: NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY) October 2018.

# SURFING REPORT

Rank	Brands	People 2+ Unique Audience (000)	People 2+ Time per person	People 18+ Unique Audience (000)	People 18+ Time per person
	Total Audience	20,657	66:03:00	17,571	77:10:00
1	Google	19,332	12:31:20	17,276	13:57:06
2	Facebook	17,028	14:42:42	16,387	15:15:58
3	YouTube	16,806	24:48:28	15,811	25:37:36
4	MSN/Outlook/Bing/Skype	12,714	2:33:33	11,914	2:41:56
5	eBay	12,039	1:25:06	11,745	1:26:50
6	Apple	11,528	3:01:47	11,436	3:03:09
7	ABC Online Network	10,868	1:12:29	10,009	1:12:13
8	PayPal	10,597	0:09:41	10,377	0:09:52
9	Instagram	10,496	3:00:35	10,426	3:01:41
10	Microsoft	10,382	1:12:50	10,124	1:13:33

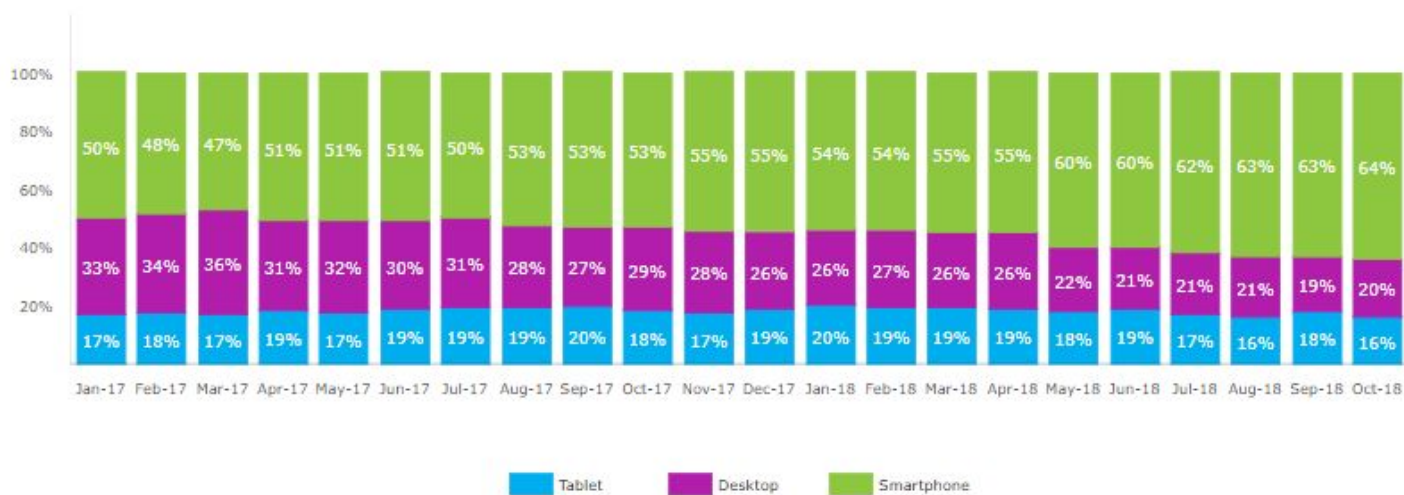
Source: Digital Content Ratings, Text, October 2018, People 2+, Monthly Total.

# UNIQUE AUDIENCE VS DURATION



Source: Digital Content Ratings, Text, October 2018, People 18+, Monthly Total. \*YouTube duration reporting is sourced from DCR Monthly Total

# TREND REPORT - TOTAL TIME BY DEVICE



Source: Digital Content Ratings, Text, October 2018, People 2+, Monthly Total. \*YouTube duration reporting is sourced from DCR Monthly Total.

# STREAMING VIDEO MARKET LINE

## STREAMING VIDEO MARKET LINE - OCTOBER 2018

Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	16,082,727	83%	31:00:49
Total 18 - 24	2,130,203	91.5%	47:45:25
Total 25 - 34	3,490,685	94.0%	49:19:47
Total 35 - 44	2,881,004	87.9%	28:15:15
Total 45 - 54	2,896,910	89.9%	24:33:05
Total 55 - 64	2,402,323	83.8%	16:04:17
Total 65+	2,281,602	59.1%	14:46:50
Total Female 18+	8,307,932	84.7%	30:42:29
Female 18 - 24	1,090,967	95.7%	40:05:32
Female 25 - 34	1,789,428	96.0%	49:54:27
Female 35 - 44	1,477,767	90.0%	30:15:19
Female 45 - 54	1,530,641	93.1%	26:58:31
Female 55 - 64	1,263,457	86.1%	14:05:36
Female 65+	1,155,672	56.3%	15:48:29
Total Male 18+	7,774,795	82.2%	31:20:24
Male 18 - 24	1,039,236	87.4%	55:48:11
Male 25 - 34	1,701,257	92.0%	48:43:19
Male 35 - 44	1,403,237	85.9%	26:08:48
Male 45 - 54	1,366,269	86.6%	21:50:10
Male 55 - 64	1,138,866	81.4%	18:15:57
Male 65+	1,125,930	62.3%	13:43:33

Source: Digital Content Ratings, Video, October 2018, People 18+, Monthly Total

# STREAMING REPORT – MONTHLY TOTAL

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total	9,330,917	19,262,100	48.4%
YouTube	7,764,121	19,262,100	40.3%
Facebook	4,657,630	19,262,100	24.2%
news.com.au*	1,814,055	19,262,100	9.4%
Daily Mail Australia*	1,569,960	19,262,100	8.2%
Buzzfeed Network*	1,504,549	19,262,100	7.8%
Vimeo Websites	1,388,754	19,262,100	7.2%
Netflix	1,084,110	19,262,100	5.6%
nine.com.au*	888,147	19,262,100	4.6%
Business Insider*	718,753	19,262,100	3.7%
ABC Online Network	701,846	19,262,100	3.6%
smh.com.au	663,616	19,262,100	3.4%
MSN/Outlook/Bing/Skype	634,906	19,262,100	3.3%
Twitter	631,550	19,262,100	3.3%
Vice Media Network*	594,534	19,262,100	3.1%
Yahoo7	380,306	19,262,100	2.0%
9Now*	360,212	19,262,100	1.9%
TenPlay*	354,126	19,262,100	1.8%
The Age	330,717	19,262,100	1.7%
taste.com.au*	274,688	19,262,100	1.4%
SBS (Special Broadcasting Service)*	272,194	19,262,100	1.4%
Google	260,019	19,262,100	1.3%
SWM 7*	254,019	19,262,100	1.3%
Herald Sun*	223,299	19,262,100	1.2%
The West Australian	204,607	19,262,100	1.1%
TwitchTV	203,329	19,262,100	1.1%

NOTE: For consistency in ranking, this report only contains video data for computer devices measured via panel. Video consumed on mobile devices is currently unable to be measured via panel and is hence excluded from these rankings.

Source: Digital Content Ratings, Video, October 2018, People 18+, Panel, Computer ONLY

\*Brands marked with an asterisk represent metrics from tagged methodology.

\*\*The Unique Audience figure is non-ad supported content.

# STREAMING REPORT – MONTHLY TAGGED

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total*	16,082,727	19,262,100	83.0%
news.com.au	2,975,415	19,262,100	15.4%
nine.com.au	2,382,211	19,262,100	12.4%
9Now	1,118,221	19,262,100	5.8%
Daily Mail Australia	862,053	19,262,100	4.5%
TenPlay	584,932	19,262,100	3.0%
taste.com.au	456,846	19,262,100	2.4%
SWM 7	406,490	19,262,100	2.1%
Herald Sun	369,021	19,262,100	1.9%
SBS (Special Broadcasting Service)	349,999	19,262,100	1.8%
The Roar	344,609	19,262,100	1.8%
The Daily Telegraph	340,384	19,262,100	1.8%
Whimn	334,138	19,262,100	1.7%
Vice Media Network	239,422	19,262,100	1.2%
AdelaideNow	226,054	19,262,100	1.2%
NT News	79,938	19,262,100	0.4%
Lost At E Minor	74,696	19,262,100	0.4%
THE AUSTRALIAN	58,392	19,262,100	0.3%
Gold Coast Bulletin	53,411	19,262,100	0.3%
The Cairns Post	44,976	19,262,100	0.2%
themercury.com.au	31,830	19,262,100	0.2%
Townsville Bulletin	26,703	19,262,100	0.1%
Buzzfeed Network	24,264	19,262,100	0.1%
Techly	21,672	19,262,100	0.1%
Geelong Advertiser.com.au	20,485	19,262,100	0.1%
Escape	7,860	19,262,100	0.0%

NOTE: Due to sample size limitations, demographic profiling of the tablet video market line is not included

NOTE: For consistency, market line metrics are based on people 18+ due to an inability to measure people under 18 via panel on mobile devices.

Source: Digital Content Ratings, Video, October 2018, People 18+, Panel + Census, Digital (C/M)

\*Unique Audience data at the total market level IS deduplicated, however at device level data is NOT duplicated e.g. sum of tablet + smartphone + PC will not equal total.

Excludes any secondary crediting content

\*\*The Unique Audience figure is ad-supported content.



## METHODOLOGY - NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY)

Nielsen Digital Panel is an audience-centric cross-device measurement solution for smartphones, tablets and PCs and is the first measurement of its kind in Australia. It leverages Nielsen's home and work panels, fused with our smartphone and tablet panels, giving an independent, cross-device view of digital media consumption.

Nielsen Digital Panel enables you to:

- Understand ACTUAL cross-device audience behaviour on computers, smartphones and tablets for websites and apps.
- View accurate and consistently measured volume metrics (time, sessions, page views) for all web browsing across PC, smartphone and tablet.
- Measure audience size and reach on mobile applications for the first time.

Nielsen Digital Panel is only measuring 'static' content across websites & applications. Video content measurement is not a function of Nielsen Digital Panel (NDP). NDP methodology is confidently and reliably able to account for on-platform measurement of audiences. On-platform refers to a publisher's owned platform assets, like their websites and their apps. This applies across all measured devices (PC, smartphone & tablet), both for browser and app.

On mobile devices only, Nielsen Digital Panel does not measure in-app content. When a publisher's content is consumed within a third-party app (key examples include Facebook, Twitter, Instagram) it is attributed to the third-party app as we are unable to identify the content being consumed in the app environment and assign it back to the publisher. For publisher content viewed using content delivery/aggregation platforms like Google AMP, Apple News, Facebook Instant Articles, again, audiences are only attributed to the third-party, not the publisher. Nielsen's solution for audience attribution of off-platform and in-app measurement is available in Digital Content Ratings. Within this solution, clients can implement Nielsen's Software Development Kit (SDK) on their content and receive direct measurement and attribution of their content consumed via these platforms.

# METHODOLOGY - DIGITAL CONTENT RATINGS

## DIGITAL CONTENT RATINGS



### METHODOLOGY: *Market Level Video Duration*



**1. ESTIMATE SHARE RATIO**

Average the PC v Mobile duration share for entities with both devices under measurement



**2. APPLY SHARE RATIO**

Apply the share ratio to the unadjusted video mobile minutes at the AU market level



**3. CALCULATE**

Add the PC video duration with the adjusted Mobile video duration to achieve total video minutes



**4. REPORT**

Market level insights delivered at a monthly frequency

**WHY**

Video consumption in Australia is prevalent across both PC's and mobile screens. When reporting video duration at the Australian market level the measurement solution is required to account for activity across all these screens to ensure an accurate representation of the total Australian video streaming landscape.

A key factor in calculating market level video duration is the deployment of the Nielsen SDK which is necessary for mobile coverage. Currently in Australia we have an environment with partial, but growing, SDK coverage. This means we have measurement across PC, but limited measurement across mobile.

The details below explain the methodology for calculating the total video duration for mobile at the market level. [This calculation does not apply at the entity \(Brand, Sub-Brand, Asset\) level.](#)

**HOW IT WORKS**

The market level video duration methodology uses an extrapolation model to account for the portion of unknown mobile video duration. The model is designed to be periodically updated when new entities have deployed the SDK, thus continually improving the accuracy of market level metrics (particularly for mobile devices).

The model has 4 main steps:

1. To account for the unknow mobile duration we estimate the share of video between mobile and computer. This is done by analysing data for those publishers that have mobile and PC measurement coverage to calculate a common share ratio.
2. Once a ratio has been estimated it is then applied to the unadjusted mobile total minutes for video giving a more accurate measure of mobile duration for the Australian video market.
3. Total video minutes is calculated by adding computer minutes and adjusted mobile minutes
4. Apply the updated Total Video Minutes to the Monthly Video Data file